



ACCOUNTING EXAMINING BOARD
Room 121C, 1400 East Washington Avenue, Madison
Contact: Brittany Lewin (608) 266-2112
February 11, 2016

The following agenda describes the issues that the Board plans to consider at the meeting. At the time of the meeting, items may be removed from the agenda. Please consult the meeting minutes for a record of the actions of the Board.

AGENDA

9:00 A.M.

OPEN SESSION – CALL TO ORDER – ROLL CALL

A. Adoption of Agenda

B. Approval of Minutes of November 10, 2015

C. Administrative Matters

- 1) Election of Officers
- 2) Liaison Appointments and Delegated Authorities
- 3) Staff Updates
- 4) CPAVerify and Accountancy Licensee Database Update

D. Legislative and Administrative Rule Matters

- 1) Legislative Liaison Report
- 2) Wisconsin Senate Bill 532 and Assembly Bill 725
- 3) Update on Pending and Possible Legislative and Rulemaking Projects

E. Credentialing Matters

- 1) Inactive Licenses

F. Newsletter Review

G. Speaking Engagement(s), Travel, or Public Relation Request(s)

- 1) NASBA Annual Conference for Board of Accountancy Legal Counsel on March 15-17, 2016 in Tucson, AZ
- 2) NASBA Annual Conference for Executive Directors and Board Staff on March 15-17, 2016 in Tucson, AZ
- 3) NASBA Eastern Regional Meeting on June 7-9, 2016 in Asheville, NC
- 4) NASBA Annual Meeting on October 30-November 2, 2016 in Austin, TX

H. Deliberation on Items Added After Preparation of Agenda:

- 1) Introductions, Announcements and Recognition
- 2) Election of Board Officers
- 3) Appointment of Board Liaison(s)

- 4) Administrative Updates or Administrative Matters
- 5) Education and Examination Matters
- 6) Credentialing Matters
- 7) Practice Matters
- 8) Legislative and Administrative Rule Matters
- 9) Liaison Reports
- 10) Informational Items
- 11) Disciplinary Matters
- 12) Presentations of Petitions for Summary Suspension
- 13) Petitions for Designation of Hearing Examiner
- 14) Presentation of Proposed Stipulations, Final Decisions and Orders
- 15) Presentation of Proposed Final Decision and Orders
- 16) Presentation of Interim Orders
- 17) Petitions for Re-Hearing
- 18) Petitions for Assessments
- 19) Petitions to Vacate Orders
- 20) Requests for Disciplinary Proceeding Presentations
- 21) Motions
- 22) Petitions
- 23) Appearances from Requests Received or Renewed
- 24) Speaking Engagement(s), Travel, or Public Relation Request(s)

I. Public Comments

CONVENE TO CLOSED SESSION to deliberate on cases following hearing (s. 19.85(1)(a), Stats.); to consider licensure or certification of individuals (s. 19.85(1)(b), Stats.); to consider closing disciplinary investigations with administrative warnings (ss. 19.85 (1)(b), and 440.205, Stats.); to consider individual histories or disciplinary data (s. 19.85 (1)(f), Stats.); and to confer with legal counsel (s. 19.85(1)(g), Stats.).

J. Credentialing Matters

1) Application Reviews

- | | |
|-----------------------|-----------------------|
| 1. Anderson, Laura | 19. Holewinski, Jin |
| 2. Barats, Eduard | 20. Hurlbut, Nathan |
| 3. Berry, Matthew | 21. James, Kathryn |
| 4. Blend, Thomas | 22. Jefferies, Kelsey |
| 5. Booth, Kevin | 23. Jin, Shu |
| 6. Boucher, Joseph | 24. Kappeler, Marta |
| 7. Butendorf, Kori | 25. Kemmerling, James |
| 8. Castro, Amber | 26. Kolb, Jordan |
| 9. Courtney, Daniel | 27. Kosa, Adam |
| 10. Demario, Katelynn | 28. Kraus, Kelly |
| 11. Etheridge, Todd | 29. Kuester, Heather |
| 12. Felhofer, Nathan | 30. Le May, Amanda |
| 13. Fox, John | 31. Mathe CPA LLC |
| 14. Fuchs, Nicholas | 32. McIntosh, Jenni |
| 15. Geray, Felicia | 33. Miles, Timothy |
| 16. Hagan, Brian | 34. Miller, Edwin |
| 17. Haselton, Keith | 35. Mirsky, Andrew |
| 18. Hayes, Lauren | 36. Mlsna, Brittany |

37. Morrison, Britany
38. Oram, Karen
39. Pahl, Jennifer
40. Pieper, Jessie
41. Pomazal, Kevin
42. Poss, Bryant
43. Raskin, Eugene
44. Rasmussen, Bryce
45. Remiker, Robert
46. Rooker, Justin
47. Rossi, Ryan

48. Schroeder, Pamela
49. Simon, Nicholas
50. Smocke, Justin
51. Stini, Jason
52. Stutsman, Krissie
53. Thompson, Mallory
54. Wang, Min
55. Winkler, Eric
56. Van Lanen, Matthew
57. Van Pelt, Aron
58. Zawila, Steve

2) Endorsement Applicants Under Wis. Stat. 442.05

- | | |
|------------------------|-------------------------|
| 1. Alexandrou, Andreas | 8. O'Sullivan, Jessica |
| 2. Bantz, William | 9. Passaglia, Linda |
| 3. Benjamin, Heather | 10. Quackenboss, Ashley |
| 4. Haumersen, Alissa | 11. Ranguette, Renea |
| 5. Jochims, Joshua | 12. Richey, Jon |
| 6. Lapworth, Jonathan | 13. Salkowski, Brian |
| 7. Nelson, Michelle | |

3) Applications for Approval of Licensure

- | | | |
|-----------------------|---------------------------|--------------------------|
| 1. Anderson, Joclyn | 20. Henika, Michael | 38. Raza, Syed |
| 2. Anderson, Rebecca | 21. Jensen, Nicole | 39. Rheinschmidt, Andrew |
| 3. Bailey, Sean | 22. Johannsen, Travis | 40. Richmond, Alicia |
| 4. Bauer, Andrew | 23. Justin, Joshua | 41. Scheffer, Stacy |
| 5. Bemis, Brady | 24. Kenas, Gregory | 42. Schneider, Kelly |
| 6. Bestick, Samantha | 25. Kindler, Sarah | 43. Schuh, Stefanie |
| 7. Bohne, Chad | 26. Kritner, Michael | 44. Selix, Claire |
| 8. Boutelle, James | 27. Loomis, Kate | 45. Singletary, Brigitte |
| 9. Broenen, Chloe | 28. Miller, Samuel | 46. Sippl, Michelle |
| 10. Brownlow, Miranda | 29. Moriarty, Emily | 47. Van Hoorn, Michael |
| 11. Canadeo, Andrea | 30. Murray, Heather | 48. Videen, Abby |
| 12. Court, Ali | 31. Nett, Jamie | 49. Witt, Nathan |
| 13. Dati, Alex | 32. Olson, Kimberly | 50. Wojciechowski, Aaron |
| 14. Duessing, Amanda | 33. Oszman, Zachary | 51. Wolters, Jessica |
| 15. Dunbar, Nicole | 34. Otero, Tess | 52. Yaeger, Joseph |
| 16. Frigo, Maria | 35. Peterson, Christopher | 53. Zimmer, Kellan |
| 17. Grunke, Wesley | 36. Peterson, Lynn | |
| 18. Hall, Clenton | 37. Quandt, Samantha | |
| 19. Heim, Brian | | |

K. Deliberation on Division of Legal Services and Compliance (DLSC) Matters

1) Proposed Stipulation and Final Decision and Order

1. 14 ACC 025 – John W. Torgerson
2. 15 ACC 012 – Linda A. Swift

L. Deliberation of Items Added After Preparation of the Agenda

- 1) Education and Examination Matters
- 2) Credentialing Matters
- 3) Disciplinary Matters

- 4) Monitoring Matters
- 5) Professional Assistance Procedure (PAP) Matters
- 6) Petitions for Summary Suspensions
- 7) Petitions for Designation of Hearing Examiner
- 8) Proposed Stipulations, Final Decisions and Order
- 9) Administrative Warnings
- 10) Review of Administrative Warnings
- 11) Proposed Final Decision and Orders
- 12) Matters Relating to Costs/ Orders Fixing Costs
- 13) Case Closings
- 14) Proposed Interim Orders
- 15) Petitions for Assessments and Evaluations
- 16) Petitions to Vacate Orders
- 17) Report from Department Auditor
- 18) Remedial Education Cases
- 19) Motions
- 20) Petitions for Re-Hearing
- 21) Appearances from Requests Received or Renewed

M. Consulting with Legal Counsel

RECONVENE TO OPEN SESSION IMMEDIATELY FOLLOWING CLOSED SESSION

N. Vote on Items Considered or Deliberated Upon in Closed Session, if Voting is Appropriate

O. Open Session Items Noticed Above not Completed in the Initial Open Session

P. APPEARANCE Al Rohmeyer, Division Administrator – Division of Legal Services and Compliance

ADJOURNMENT

MEETINGS AND HEARINGS ARE OPEN TO THE PUBLIC, AND MAY BE CANCELLED WITHOUT NOTICE.

Times listed for meeting items are approximate and depend on the length of discussion and voting. All meetings are held at 1400 East Washington Avenue, Madison, Wisconsin, unless otherwise noted. In order to confirm a meeting or to request a complete copy of the board's agenda, please call the listed contact person. The board may also consider materials or items filed after the transmission of this notice. Times listed for the commencement of disciplinary hearings may be changed by the examiner for the convenience of the parties. Interpreters for the hearing impaired provided upon request by contacting the Affirmative Action Officer, 608-266-2112.